

Contract Number EP-C-09-020
Work Assignment Number WA 3-16
Performance Work Statement

Section 1. Title: Communication Support for Climate Ready Estuaries 2012

Section 2. Work Assignment Manager:

Michael Craghan, Ph.D.
Oceans and Coastal Protection Division
OW/OWOW/OCPD/CMB
US Mail: 1200 Pennsylvania Avenue NW — 4504T
Physical: 1301 Constitution Avenue NW — 7214
Washington, DC 20460
Phone 202-566-1946
craghan.michael@epa.gov

Section 3. Summary:

The Climate Ready Estuaries program works with the National Estuary Programs and the coastal management community to: (1) assess climate change vulnerabilities, (2) develop and implement adaptation strategies, and (3) engage and educate stakeholders. CRE shares NEP examples to help other coastal managers, and provides technical guidance and assistance about climate change adaptation in support of Clean Water Act goals. See: <http://www.epa.gov/cre/>

EPA will supply all written content and photographs (except cover art for the 2012 Progress Report) for the four publications to be developed under this work assignment. The Contractor will use that content to create the four documents listed below that will each be printed and published online.

1. Risk Management pamphlet from the Climate Ready Estuaries 2011 Progress Report
CRE wants to have a stand-alone version of 8 pages of content that was published in the 2011 Progress Report.

2. Climate Ready Estuaries 2012 Progress Report
CRE wants to communicate its FY12 accomplishments to the coastal management community in December 2012 (or as soon thereafter as possible given the constraints of publication steps that must be accomplished).

3. Clean Water Act pamphlet
CRE wants to communicate how climate change will affect the achievement of Clean Water Act goals. CRE adaptation projects will be featured.

4. Lessons Learned from the Climate Ready Estuaries Program: New England brochure
CRE wants to communicate lessons-learned from projects that it supports with local National Estuary Programs in specified regions (i.e. New England) of the United States in December 2012 (or as soon thereafter as possible given the constraints of publication steps that must be accomplished). CRE wants to develop a template to use for future regional lessons-learned documents.

Section 4. Period of Performance:

The performance period is from notice of award to February 28, 2013. The project schedule or expected dates for deliverables are described below in Section 7.

Section 5. Quality Assurance:

The tasks in this work assignment involve neither the collection nor the use of environmental data. No task-specific quality assurance project plans are required.

Section 6. Background:

The sequence of events for each of the publications to be created under this work assignment is described in the following table. This description of the process is presented to the Contractor for informational purposes.

The EPA publication process includes numerous reviews and approvals. The duration of those reviews as well as their outcomes cannot be known ahead of time. All reviewers jealously guard their prerogatives, and some reviewers will not look at the document until it is prepared in its final form, thus the process is somewhat unpredictable. It will be unwise to plan that either the text which EPA initially supplies or the contractor's initial graphical layout will pass through the process unchanged. That being said, program staff are aware of the situation and content is tuned so it turns out that most of the review comments tend to be about copy edits or about tweaks to graphical elements such as logos. Further, each of the four documents to be prepared under this work assignment is similar to other documents that have already been published so there are precedents for what is to be done. Wholesale changes are not expected from the document review process.

The steps in the publication process, and the best understanding of the review process (based on what we learned during production of the CRE 2011 Progress Report) is described in the following table. Publications that are shorter than the 2011 Progress Report (24 pp.), or that merit a lower level of attention than an EPA program's annual report, may move through the approval process at a faster pace.

Publication Steps

Step	Responsible party	Task	Estimated duration in 2012	Actual duration in 2011
1	EPA	EPA program staff prepares content and a conceptual layout, and obtains management approval to move forward. Initial EPA editorial content is provided by the WAM (with a copy to the Contracting Officer (CO)) to the Contractor.		
2	Contractor	Contractor takes in EPA initial content and creates a <u>draft document</u> . During this document development phase, if the Contractor requires clarifications or additional technical information, the Contractor and WAM will discuss via emails, phone calls and meeting (if needed) to clarify any unclear and/or informational gaps. If during the Contractor and WAM discussions, the Contractor needs technical direction (TD) from the WAM, the WAM will provide this written TD (with a copy to the CO).		
3	EPA	EPA program staff reviews the draft document. If necessary, any requested revisions will be provided by the WAM (with a copy to the Contracting Officer) to the Contractor. If needed revisions are minor, program staff will skip to Step 5.		
4	Contractor	If necessary, using the process described in Step 2, the Contractor makes requested <u>revisions to the draft document</u> .		
5	EPA	EPA program staff and management conditionally approve the document pending any requested changes. Success in Step 2/4 will ease the process of this Step. (In the past these reviews have mostly generated copy edits for grammar and usage.)	2 weeks	2.5 weeks
6	Contractor	If necessary, using the process described in Step 2, the Contractor makes requested revisions. Contractor produces a <u>final draft document</u> that is considered to be “print ready”. This can still be in a “draft” format; e.g. final 508-compliant files would not be needed at this stage, but finalizing should be all that remains to do.		

7	EPA	EPA communications office and upper management conditionally approve the document pending any requested changes. In the past these changes have been cosmetic or light text editing. No major changes are expected.	4 weeks	7.5 weeks
8	Contractor	Using the process described in Step 2, Contractor and program staff collaborate to make requested changes and contractor produces a revised <u>final draft document</u> . Final 508-compliant files would not be needed at this stage, but finalizing should be all that remains to do.		
9	EPA	EPA communications office approves publication of the document	2 weeks	1 week
10	Contractor	Contractor <u>finalizes document</u> for delivery to program staff. A 508-compliant .pdf version should be delivered electronically as soon as possible. Files for printing should be delivered soon after that.		
11	EPA	EPA staff places documents online		
		Total time for review and approvals	8 weeks	11 weeks

In 2011 the total time elapsed in Steps 5, 7, and 9 was 11 weeks. Familiarity with the process is now expected to reduce the time of review in those steps to be 8 weeks of time in 2012 (as described). In the unlikely event that all were to go perfectly, then all the reviews would go faster and Steps 4, 8 and 9 would not be necessary.

Section 7. Description of Tasks:

TASK 1. Development of a work plan and cost estimate

The Contractor shall develop a work plan describing the necessary steps and estimated hours and costs to complete each of the tasks specified in this work assignment. The work plan shall also identify all of the key personnel participating in this work assignment.

A separate cost and hours estimate shall be provided for each of the five tasks (Tasks 1 and 2A–2D). The contractor shall prepare a detailed work plan and budget for the indicated tasks in this Work Assignment. The work plan shall include a description of: (a) proposed staff; (b) the number of hours and labor classifications proposed for each task, to include both prime contractor and subcontractor labor; and (c) a list of deliverables, with due dates and schedule for deliverables. If a subcontractor(s) is proposed and subcontractors are outside the metropolitan DC area, the contractor shall include information on plans to manage work and contract costs. All P levels, hours and total dollars for each task shall be provided, and other direct costs greater

than \$100.00 shall be itemized in detail. The contractor shall provide their job number with all invoices to facilitate their expediency.

The work plan shall convey awareness of the work steps and time constraints that the contractor will need to accommodate in order to complete Tasks 2B and 2D in December 2012.

The work plan shall be due 21 days from the receipt of the work assignment.

Task	Final Deliverable	Time for completion
1. The Contractor shall develop a work plan and cost estimate.	Work plan and cost estimate.	Within 21 days of receipt of the work assignment.

TASK 2A. Risk Management pamphlet

The contractor shall provide a Risk Management pamphlet that meets the following requirements:

- 1) The pamphlet will be a conversion of 8 pages of the Climate Ready Estuaries 2011 Progress Report into a stand-alone document.
- 2) The pamphlet will be an 8-page 8.5"×11" sized document (i.e. a booklet formed from content on both sides of two 11"×17" printed sheets).

InDesign files for the Climate Ready Estuaries 2011 Progress Report are available if needed. The work under Task 2A consists of

1. Extracting the center 8 pages of the 2011 Progress Report (pages numbered 7–14).
2. Editing the content of the page footers and renumbering pages.
3. Adding new EPA document publication information to the last page.
4. Creating a 508-compliant .pdf file for posting to the CRE website.
5. Preparing files to support high quality printing.

During this document development phase, if the Contractor requires clarifications or additional technical information, the Contractor and WAM will discuss via emails, phone calls or face-to-face local meetings in Arlington, VA or Washington, DC (if needed) to clarify any unclear and/or informational gaps. If during the Contractor and WAM discussions, the Contractor needs technical direction (TD) from the WAM, the WAM will provide this written TD to the Contractor (with a copy to the CO).

Contractor Task	Final Deliverable	Time for completion
Draft document [equiv. to Publication Step 6]	A review .pdf version of the document, with all required EPA metadata	within 1 month of receipt of the work assignment.
Responses to agency review [Publication Step 8]	A review .pdf version of the document, with all required EPA metadata	within 2 weeks of receiving agency comments
Final document deliverables [Publication Step 10]	a. Section 508-compliant .pdf document with all required EPA metadata, ready for posting on the CRE website. b. Electronic files to support high quality document printing.	a. Final Section 508-compliant .pdf within 2 weeks of satisfactory completion of prior step. b. Files for printing within 1 week of .pdf delivery.

TASK 2B. Climate Ready Estuaries 2012 Progress Report

The contractor shall provide a Climate Ready Estuaries 2012 Progress Report that meets the following requirements:

- 1) The progress report shall highlight CRE program activities, October 1, 2011–September 30, 2012.
- 2) The progress report shall announce the climate change adaptation projects that CRE initiates in FY12
- 3) The front and back covers and their inside pages shall be illustrated with a stock photograph that the contractor procures on EPA’s behalf.
- 4) The progress report shall be a 24-page (including report covers), 8.5"×11" document (i.e. a booklet formed from content on both sides of six 11"×17" printed sheets) that is formatted like CRE’s 2010 and 2011 progress reports. That is, it “fits” into the growing set of annual reports.

Copies of the 2011 Progress Report and the 2010 Progress Report are available at:
<http://www.epa.gov/cre/toolkit.html>

EPA program staff will prepare all written content and will submit digital photographs or graphics to support document production. EPA program staff will prepare an initial document layout and table of contents.

Program staff will be able to hand over 100% of the editorial content as soon as requested.

The contractor will identify candidate stock photos to be used on the covers of this report, gain EPA’s approval for one, and procure unlimited rights for EPA to use that stock photo. The photo should match the general coastal theme and dominant blue coloring of other CRE report covers.

The center 8-pages of the 2012 Progress Report will focus on CRE projects and the Clean Water

Act, and they should be produced to highly resemble the center 8-pages of the 2011 Progress Report. These pages will be converted into a separate 8-page pamphlet in Task 2C of this work assignment.

CRE wants to communicate its FY12 accomplishments to the coastal management community by publishing this progress report online in December 2012 (or as soon thereafter as possible, given the constraints of publication steps that must be accomplished).

During this document development phase, if the Contractor requires clarifications or additional technical information, the Contractor and WAM will discuss via emails, phone calls or face-to-face local meetings in Arlington, VA or Washington, DC (if needed) to clarify any unclear and/or informational gaps. If during the Contractor and WAM discussions, the Contractor needs technical direction (TD) from the WAM, the WAM will provide this written TD to the Contractor (with a copy to the CO).

Contractor Task	Final Deliverable	Time for completion
Draft document [Publication Step 2]	a. A review .pdf version of the document, with all required EPA metadata b. High resolution photograph used for the report covers, as well as a copy of the image license	As soon as possible, cognizant of all that must occur to publish this in December 2012.
Responses to agency review [Publication Steps 4, 6, or 8]	A review .pdf version of the document, with all required EPA metadata	within 1 week of receiving agency comments, for each step that is needed
Final document deliverables [Publication Step 10]	a. Section 508-compliant .pdf document with all required EPA metadata, ready for posting on the CRE website. b. Electronic files to support high quality document printing.	a. Final Section 508-compliant .pdf as soon as possible, but within 1 week of satisfactory completion of prior step. b. Files for printing within 1 week of .pdf delivery.

TASK 2C. Clean Water Act pamphlet

The contractor shall provide a Clean Water Act pamphlet that meets the following requirements:

- 1) The pamphlet shall be created from the center 8 pages of the 2012 Progress Report (Task 2B of this work assignment), with only the minimum changes required to convert it to a

stand-alone EPA publication. The changes for Task 2C parallel the changes required to create the document in Task 2A.

- 2) The pamphlet shall be eight (8) pages in length, 8.5"×11" page sized document (i.e. a pamphlet formed from content on both sides of two 11"×17" printed sheets) that highly resembles a similar 8-page section at the center of the CRE 2011 Progress Report.

Copies of the 2011 Progress Report are available at: <http://www.epa.gov/cre/toolkit.html>

Creating interim draft versions and the EPA document reviews of this pamphlet will be accomplished using Task 2B. This Task 2C is simply to convert the approved center 8 pages of the 2012 Progress Report to a separate stand-alone pamphlet. The first time these 8-pages should exist as a stand-alone pamphlet is after the 2012 Progress Report moves out of approval in Publication Step 7.

During this document development phase, if the Contractor requires clarifications or additional technical information, the Contractor and WAM will discuss via emails, phone calls or face-to-face local meetings in Arlington, VA or Washington, DC (if needed) to clarify any unclear and/or informational gaps. If during the Contractor and WAM discussions, the Contractor needs technical direction (TD) from the WAM, the WAM will provide this written TD to the Contractor (with a copy to the CO).

Contractor Task	Final Deliverable	Time for completion
Final draft document [Publication Step 8]	A review .pdf version of the document, with all required EPA metadata	Due at the same time as the parallel step of Task 2B.
Final document deliverables [Publication Step 10]	a. Section 508-compliant .pdf document with all required EPA metadata, ready for posting on the CRE website. b. Electronic files to support high quality document printing.	Due at the same time as the final document deliverables for Task 2B.

TASK 2D. Lessons Learned from the Climate Ready Estuaries Program: New England brochure

The contractor shall provide the Lessons Learned from the Climate Ready Estuaries Program: New England brochure that meets the following requirements:

- 1) The brochure shall highlight lessons-learned from climate change adaptation projects that CRE supported with National Estuary Program partners in New England.
- 2) The brochure shall be a 4-page 8.5"×11" sized document (i.e. a booklet formed from content on both sides of one 11"×17" printed sheet).

- 3) The brochure shall fit with the format of CRE's other lessons-learned document. That document contains lessons-learned at the national level. Regionally-based documents do not need to mimic that format, but it should be visually apparent that the national document and the regional ones relate to each other as part of the body of knowledge coming out of the Climate Ready Estuaries program.
- 4) The brochure will serve as a template that can be used in the future to prepare similar lessons-learned documents for other regions of the U.S.

A copy of the existing CRE lessons-learned publication is available at:
<http://www.epa.gov/cre/toolkit.html>

EPA program staff will prepare all written content and will submit digital photographs or graphics to support document production. EPA program staff intends to provide all content to the contractor no later than October 2, 2012.

This document will be prepared with input that CRE program staff coordinates with the EPA Region 1 office. Although the review and approval sequence for this pamphlet will follow the steps outlined in the Background section (above), this will be a 4-page document (not 24 pages like the Progress Report) and should have a lower intensity of scrutiny as well. Despite the potential shortening of the review cycle due to those factors, additional time may be required for EPA interoffice communication and collaboration.

During this document development phase, if the Contractor requires clarifications or additional technical information, the Contractor and WAM will discuss via emails, phone calls or face-to-face local meetings in Arlington, VA or Washington, DC (if needed) to clarify any unclear and/or informational gaps. If during the Contractor and WAM discussions, the Contractor needs technical direction (TD) from the WAM, the WAM will provide this written TD to the Contractor (with a copy to the CO).

Contractor Task	Final Deliverable	Time for completion
Draft document [Publication Step 2]	A review .pdf version of the document, with all required EPA metadata	As soon as possible, cognizant of all that must occur to publish this in December 2012.
Responses to agency review [Publication Steps 4, 6, or 8]	A review .pdf version of the document, with all required EPA metadata	within 1 week of receiving agency comments, for each step that is needed
Final document deliverables [Publication Step 10]	a. Section 508-compliant .pdf document with all required EPA metadata, ready for posting on the CRE website. b. Electronic files to support high quality document printing.	a. Final Section 508-compliant .pdf as soon as possible, but within 1 week of satisfactory completion of prior step. b. Files for printing within 1 week of .pdf delivery.

Section 8. General Work Assignment Requirements

A. Contractor Requirements: The Contractor shall provide electronic copies of the monthly progress reports to both the EPA Work Assignment Manager (WAM) and the Project Officer. Each progress report shall describe the technical progress and expenditures for the same time period as the corresponding invoice. The reports shall list by task the amount of work completed, and shall include a table of hours expended by personnel for each task. The monthly progress reports shall also identify any problems or difficulties encountered.

The Contractor shall submit drafts of all deliverables to the EPA Work Assignment Manager (WAM) for review, prior to submission of the final product. The Contractor shall incorporate all EPA WAM comments into the final deliverables, unless otherwise agreed to by the EPA WAM. The Contractor shall adhere to all applicable EPA management control procedures as implemented by the EPA Contracting Officer, the Project Officer, and the WAM.

B. Compliance with Section 508 Requirements: Section 508 of the Rehabilitation Act mandates that all Federal departments and agencies make electronic and information technology accessible to individuals with disabilities. This includes all individuals with disabilities wishing to access Federal information. EPA is committed to making every possible effort to ensure that all electronic and information technology developed, procured, maintained, or used by EPA is accessible to all persons with disabilities. Consequently, according to the contract clause “EPAAR 1552.2119-79: Compliance with EPA Policies for Information Resources Management”, all deliverables submitted by the Contractor shall be compliant with the Section 508 requirements.

C. Identification as Contracting Staff: To avoid the perception that Contractor personnel are EPA employees, all Contractor personnel shall be clearly identified as independent contractors of EPA when participating in events with any outside parties or the public. When speaking with the public, the Contractor shall refer all interpretations of policy to the EPA WAM.

D. Travel: Non-local travel is not required.